

# Kentucky Health Benefit Exchange



Kentucky Health Benefit Exchange

## **Application Assister**

## **Welcome Packet**



## **KHBE Application Assister Welcome Packet**

**This Welcome Packet is designed to onboard and introduce new Application Assistants and Certified Application Counselors (CACs) to the Kentucky Health Benefit Exchange's Application Assister Program. This document provides an overview of the onboarding process and detailed onboarding steps. Additional Application Assister training materials can be found on KHBE's website at [KHBE.ky.gov](https://www.khbe.ky.gov).**

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# **KHBE Application Assister Welcome Packet**

## **Welcome Letter**

### **Getting Started with the Kentucky Health Benefit Exchange**



Welcome to the Kentucky Health Benefit Exchange (KHBE) Application Assister Program! KHBE oversees and manages the program, the certification process, education and outreach, and program information.

As an Application Assister, you will work with individuals to complete applications and facilitate their enrollment in health coverage, by helping them navigate through either the Federally Facilitated Marketplace (FFM) or by determining their eligibility for Medicaid or the Kentucky Children's Health Insurance Program (KCHIP) through the Benefind Self Service Portal (SSP).

KHBE is obligated under federal requirements to track both federal and state training completions for all Application Assistants and Organization Administrator. KHBE coordinates and monitors these training requirements. This packet outlines the curriculum for the required trainings that you will need to complete before you become certified as an Application Assister/ Organization Administrator. Please read the instructions carefully as you navigate through the certification process and follow the steps in the order they are listed. Do not skip any steps.

If you have been designated the Organization Administrator, you will have additional trainings that will be required. Not only will you be trained on the roles and responsibilities of an Application Assister, but you will assume the responsibility of managing your organization and its users in the Kentucky Online Gateway (KOG). KOG is the platform from which Application Assistants access Benefind SSP and Assister training. The information in this packet will help you differentiate your role as an Organization Administrator from the role of an Application Assister.

Thank you for assuming the role of an Application Assister/ Organization Administrator. It is the dedicated efforts of the Assistants like you, which allow Kentucky to lower its uninsured rate and provide access to quality health coverage for all Kentuckians.

KHBE Team

## KHBE Application Assister Welcome Packet

### Application Assister Onboarding Glossary of Terms

KHBE has put together a glossary of terms for Application Assistants to review to help them through the onboarding process.

#### Application Assister Onboarding Glossary

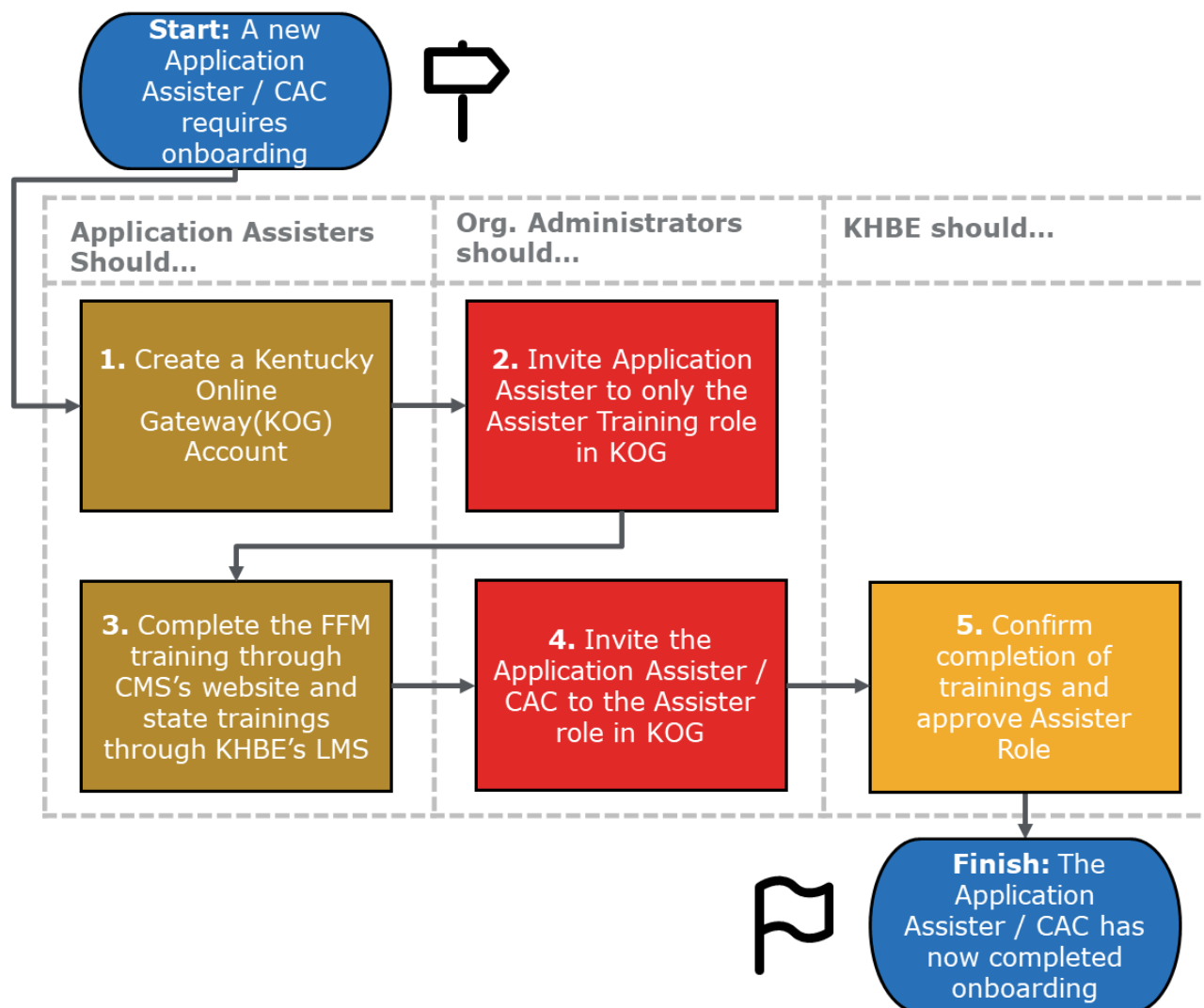
Term	Definition
<b>Assister / Assister Training Role</b>	Roles assigned to Application Assistants in the Kentucky Online Gateway that grants them access to training and Medicaid enrollment
<b>Benefind Self Service Portal</b>	A Kentucky Commonwealth website used by Application Assistants to enroll individuals to Medicaid.
<b>FFM</b>	Federally Facilitated Marketplace
<b>HealthCare.gov</b>	A health insurance marketplace operated by the federal government to help individuals shop for and enroll in affordable, private health insurance through the federal marketplace.
<b>KCHIP</b>	A program that provides health insurance for children. The program was enacted to provide health coverage to children facing barriers such as prohibitive cost and lack of access to coverage.
<b>Kentucky Online Gateway</b>	A website: KOG.CHFS.ky.gov, that Application Assistants visit to access the Self Service Portal.
<b>Medicaid</b>	A federal and state program that provides health coverage to low-income adults, pregnant women, children, and individuals with disabilities.
<b>My Purpose</b>	The Commonwealth of Kentucky's Learning Management System where Application Assistants complete training. My Purpose is access through the Self Service Portal.

## KHBE Application Assister Welcome Packet

### Application Assister Onboarding Overview

#### New Application Assister Onboarding Process Flow

New Application Assistors, Certified Application Counselors (CACs), and Organization Administrators should follow the high-level process flow below when onboarding and completing trainings on KHBE's Learning Management System. The below process flow is divided by responsibility. See the following sections for detailed steps for each stage of the process flow.



Once an Application Assister / CAC has completed onboarding, they should have access to KHBE's Learning Management System and the Benefind SSP

## KHBE Application Assister Welcome Packet

### Creating a Kentucky Online Gateway (KOG) Account

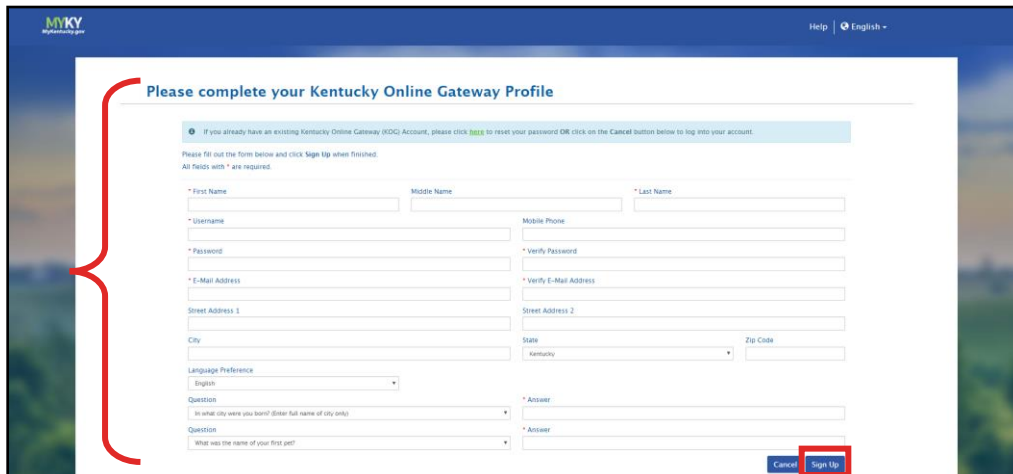
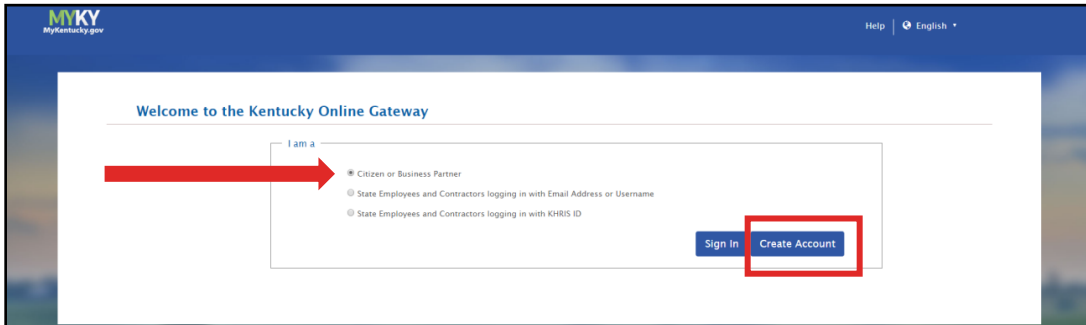
To access important Application Assister programs such as Benefind SSP and KHBE's Learning Management System (LMS), Application Assisters must create a Kentucky Online Gateway (KOG) Account. Follow the steps below to create a KOG Account.

**Please note:** To create a KOG account, Application Assisters must use a valid work email that has not been used for a Citizen KOG Account

1. Create a Kentucky Online Gateway(KOG) Account

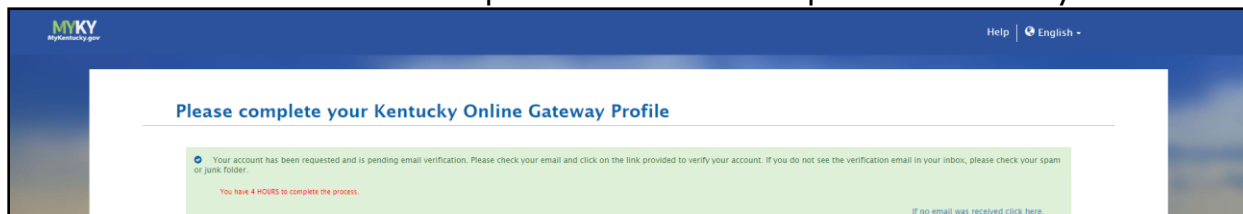
#### Steps to Create a KOG Account

1. Navigate to the KOG home page using Google Chrome
  - <https://KOG.chfs.ky.gov/home>
2. Select **"Citizen or Business Partner"**
3. Select **"Create Account"** located at the bottom of the screen



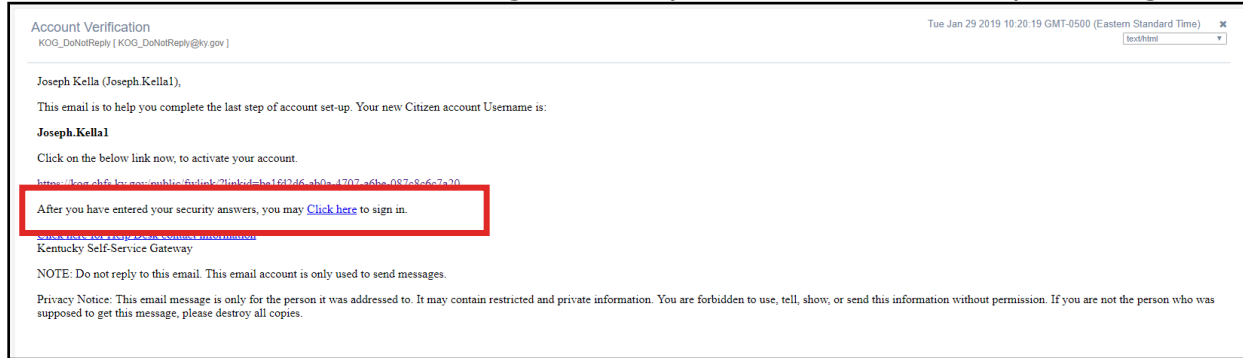
## KHBE Application Assister Welcome Packet

4. Enter a name into the **"First Name"** field
5. Enter a name into the **"Last Name"** field
6. Enter a response into **"Username"** field
  - The Username chosen is the name that will be shown in the CHFS Public SharePoint Site's history once a record is created, edited, or submitted.
  - Username example: FirstName.LastName—**William.Smith**
  - Username example: FirstNameMiddleInitial.Last Name—**WilliamJ.Smith**
7. Enter the User's mobile phone number into the **"Mobile Phone Number"** field
8. Enter a password into the **"Password"** field
  - Password must be at least 8 characters in length and contain at least one number, one lowercase letter, and one uppercase letter
9. Enter the previously selected password in the **"Verify Password"** field to verify the password
10. Enter a valid work email address into the **"Email Address"** field
11. Enter the previously selected email address in the **"Verify E-mail Address"** field to verify the email address
12. Enter a street address into the **"Street Address 1"** field
13. Enter a street address into the **"Street Address 2"** field
14. Enter a city for the street address provided in the **"City"** field
15. Enter a zip code for the street address provided in the **"Zip Code"** field
16. Select a preferred language from the **"Language Preference"** drop-down box
17. Select a question from the **"Security Question"** drop-down box
18. Below the previously selected security question, enter the response for the security question in the **"Answer"** field
19. Select a question from the second **"Security Question"** drop-down box
20. Below the previously selected security question, enter the response for the security question in the **"Answer"** field
21. Select **"Sign Up"**
22. A confirmation notification will display, and an email notification will be sent to the email provided within the profile screen by the User

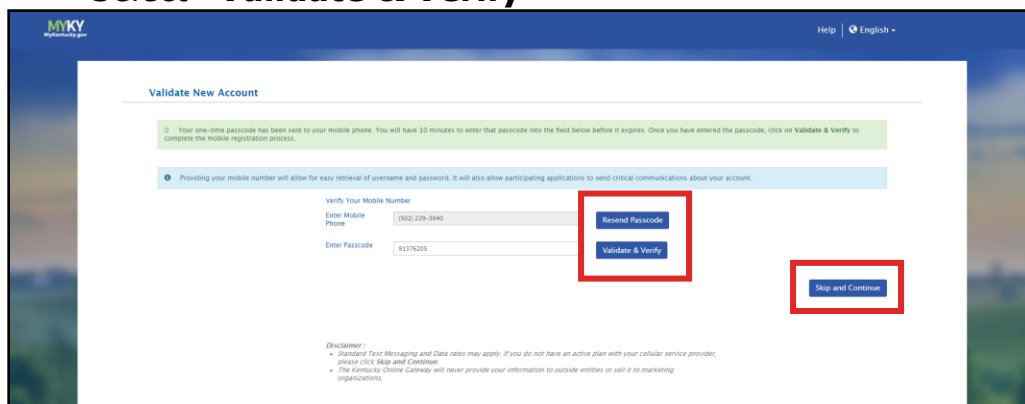


## KHBE Application Assister Welcome Packet

23. Once the automated activation email has been received, select the **"activation link"** in the email
- The activation link **must be selected within 24 hours** to complete the verification process or the account request will be deleted, and the registration process must be completed again



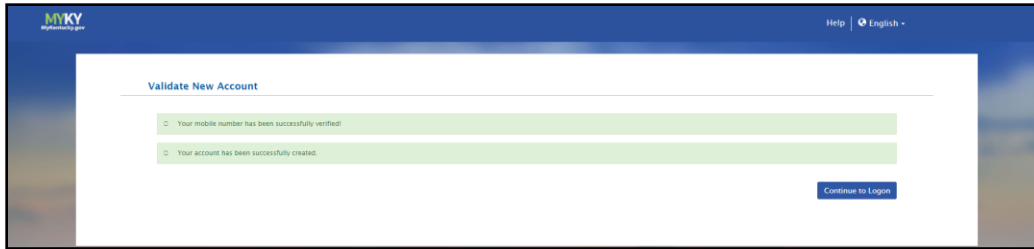
24. Select **"Continue to Logon"** located in the bottom right corner of the screen
25. If an Application Assister provided a mobile number, the Application Assister will be prompted to register that mobile number. An Application Assister may skip mobile registration at this time by using the button in the bottom right corner of the screen. However, to register a mobile number follow the steps below.
- To register the mobile number, the User will select **"Send Passcode"** next to the prepopulated phone number
  - The User will receive a text message on the mobile device containing an 8-digit code
  - Enter the code received in the Enter Passcode field
  - Select **"Validate & Verify"**



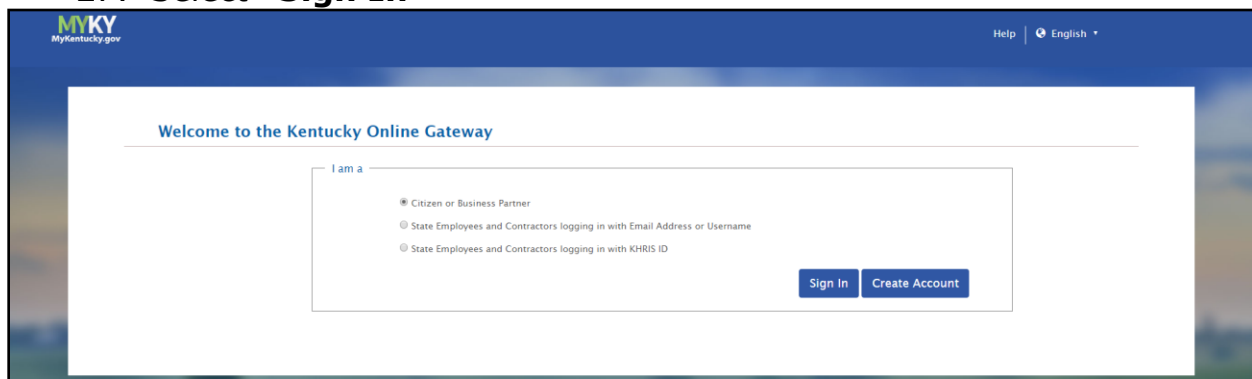
- The User will receive a notification that the mobile device has been successfully validated and the account has been created



## KHBE Application Assister Welcome Packet



- Select **"Continue to Logon"** in the bottom right corner of the screen
  - The User will be navigated to the KOG Home Page
26. Select **"Citizen or Business Partner"**
27. Select **"Sign In"**



28. Enter the credentials and select **"Log In"**

### KOG Registration is Now Complete!

For more KOG information and troubleshooting please refer to the KOG Quick Reference Guide on the KHBE Website: [KHBE.ky.gov](http://KHBE.ky.gov)

## KHBE Application Assister Welcome Packet

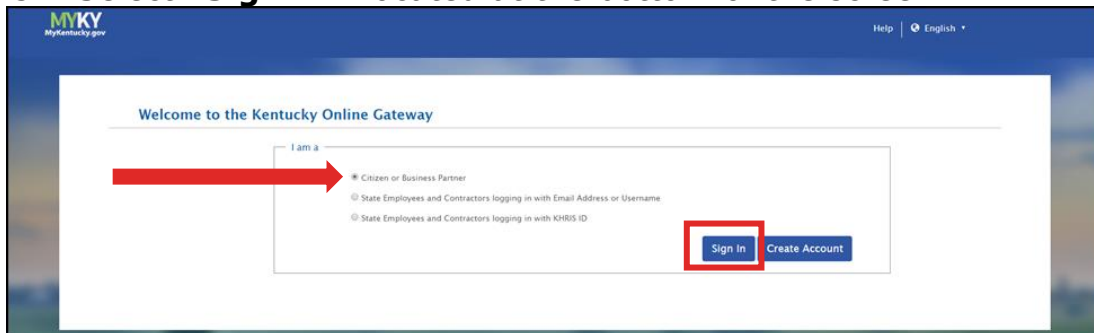
### Inviting Application Assisters to the Assister Training Role

Inviting Application Assisters and CACs to the Assister Training Role must be completed by an Organization Administrator. Organization Administrators complete the invitation through the Organization Management tile from the KOG dashboard. Once an Application Assister / CAC has been invited to the Assister Training role, they will be able to access KHBE's Learning Management System. Organization Administrators should follow the steps below to invite an Application Assister to the LMS Training Role.

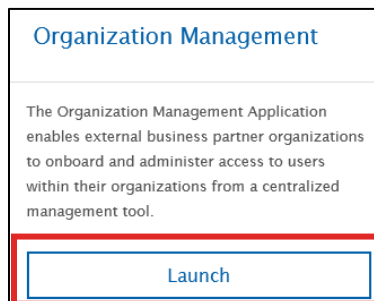
2. Invite Application Assister to only the Assister Training role in KOG

### Steps for Organization Administrators to send the Assister Training Role Invitation

1. Navigate to the KOG home page using Google Chrome
  - <https://KOG.chfs.ky.gov/home>
2. Select **"Citizen or Business Partner"**
3. Select **"Sign In"** located at the bottom of the screen



4. Sign into your KOG account using your user name and password
5. Click **"Launch"** on the Organization Management Tile from the KOG Dashboard



6. Click **"Manage"** next to the organization you need to manage

## KHBE Application Assister Welcome Packet

Kentucky Online Gateway

Welcome Justin Mullins | My Account | Sign Out | Help

Org Name

Organization Name	Organization Type Name	Manage
Accent Therapeutic Services	OKHBE Assisters	<input type="button" value="Manage"/>

7. Select the **"Invite Users"** tab and search for the Application Assister's name in the **"User to Invite"** search field
8. Click **"Add"** next to Assister Training and Cornerstone OnDemand
9. Click **"Send Pending Invitations"**

Kentucky Online Gateway

Welcome Justin Mullins | My Account | Sign Out | Help

Organizations > Community Action Kentucky > Organization Invites

Details | Email Domains | **Invite Users** | Pending Invitations | Manage Users | Recertification Dashboard

1. User to Invite

Or

Please fill out the form below to invite a New User

\* First Name:

\* Last Name:

\* Email Address:

2. Select Roles To Invite

Organization Admin Group(s)

☐ OKHBE Assister Organization Group

Organization Roles

Role Name	App Name	
Assister	Self Service Portal	<input type="button" value="Add"/>
Assister Training	Cornerstone OnDemand	<input type="button" value="Add"/>
CHFS SP External Visitors	CHFS External SharePoint Sites	<input type="button" value="Add"/>

3. Selected Roles

Assister Training

MyPurpose Learning Management  
system for Application Assisters

The Application Assister should now have the Assister Training Tile on the KOG home screen

## KHBE Application Assister Welcome Packet

### Complete the FFM Training and KHBE Trainings

Once the Application Assister has the Assister Training Tile, they should complete the Federally Facilitated Marketplace (FFM) training and KHBE's trainings. The FFM training is found on the Centers for Medicare & Medicaid Services website and covers the Federal Health Insurance Marketplace, plan eligibility, and the Application Assister role and responsibilities. KHBE's trainings are provided through KHBE's Learning Management System. KHBE's trainings cover the Application Assister role and responsibilities specific to the Commonwealth of Kentucky. Application Assistors should follow the steps below to complete the FFM Training and the KHBE Trainings.

3. Complete the FFM training through CMS's website and state trainings through KHBE's LMS

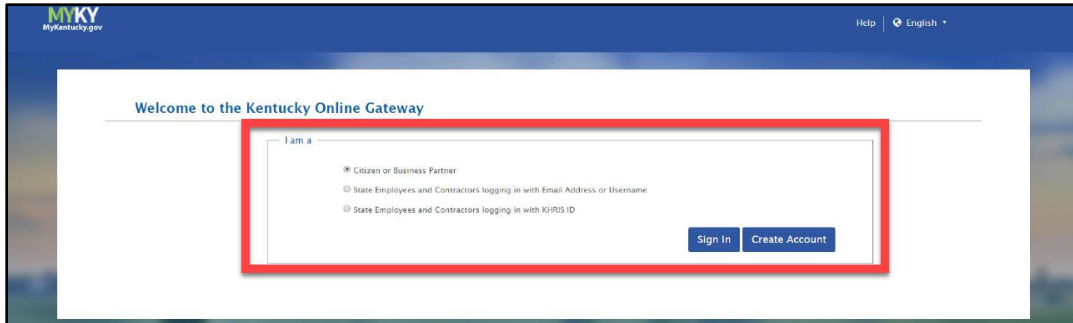
#### Steps to Complete the FFM Training

1. Navigate to CMS's Application Assister Training website:
  - <https://marketplace.cms.gov/technical-assistance-resources/training-materials/training.html>
  - **NOTE:** If your agency contracts with KHBE select "**State Funded Assister or State IPA**" at the start of the FFM Training
2. Complete the FFM Training
3. Pass the FFM Training Assessment with a score of 80% or higher
4. Send the FFM Certificate of Completion to KHBE
  - Email in PDF format to KHBE at [KHBE.Program@ky.gov](mailto:KHBE.Program@ky.gov)
  - Title PDF FFM Certificate with the following naming convention: "First Name Last Name, Year (YYYY), FFM Completion Certificate"
    - **Example:** "John Smith 2020 FFM Completion Certification"
  - Mail: KHBE  
275 E. Main Street, 4W-E  
Frankfort, KY, 40621

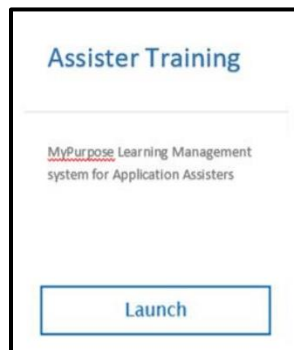
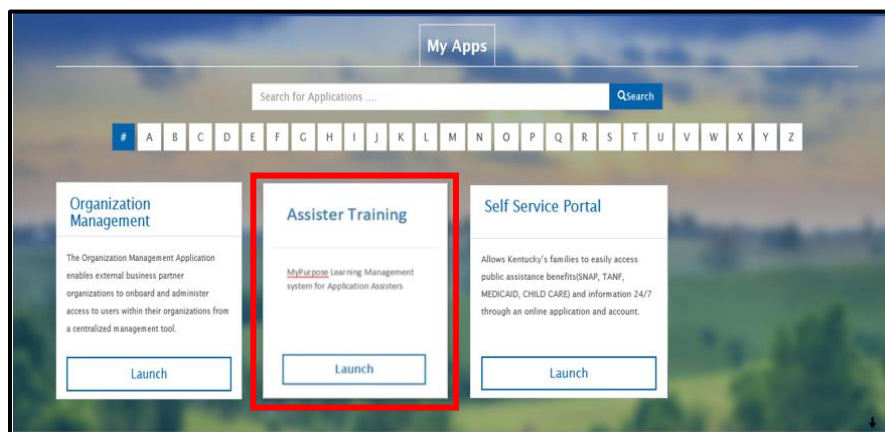
#### Steps to Complete KHBE's Trainings

1. Navigate to the KOG Homepage
  - <https://kog.chfs.ky.gov/home>
2. Log into KOG using your Application Assister KOG credentials

## KHBE Application Assister Welcome Packet



3. Navigate to the Assister Training Tile from the KOG dashboard
4. Click **"Launch"** from the Assister Training Tile



5. Navigate to the My Purpose homepage

## KHBE Application Assister Welcome Packet



**Please Note:** It may take 24 hours for KHBE's trainings to appear on My Purpose after **"Clicking"** launch

6. Type **"KHBE"** in the search bar at the top right of the My Purpose screen



7. Look for the following trainings in the Global search results. Complete the trainings in the following order.

1

• KHBE FFM Validation

2

• KHBE New Application Assister Training V2

3

• KHBE Benefind SSP Policy and System Training

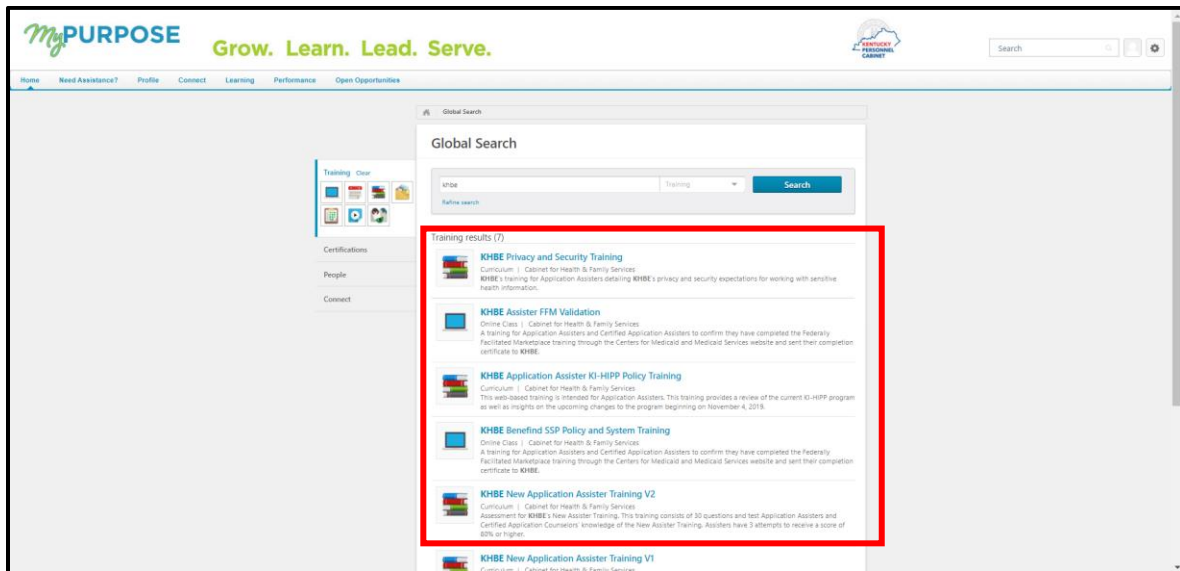
4

• KHBE Privacy and Security Training

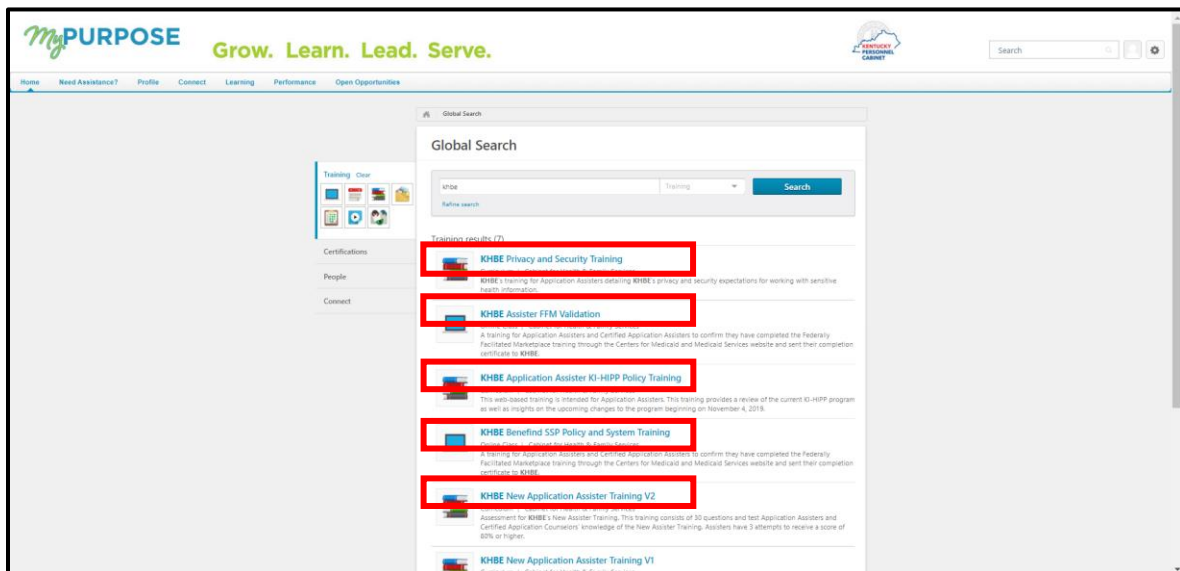
5

• KHBE KI-HIPP Policy Training

## KHBE Application Assister Welcome Packet

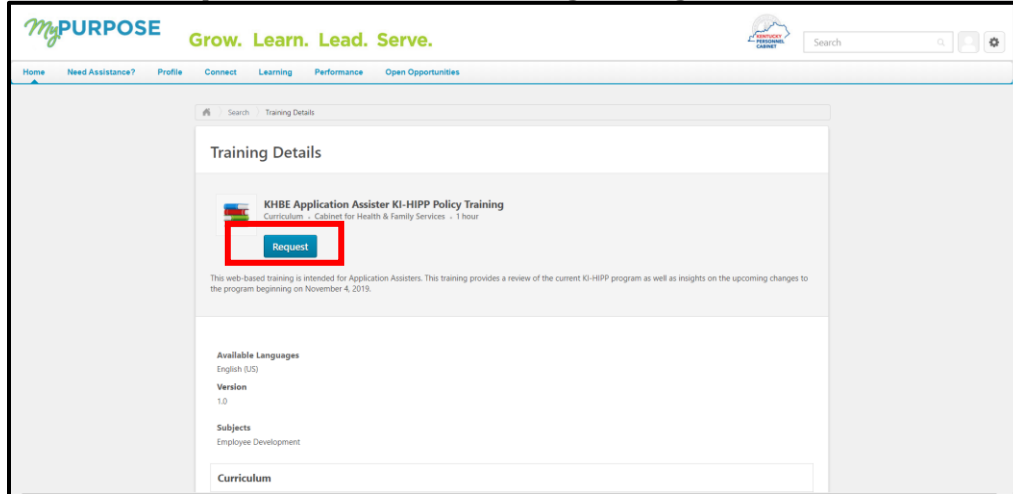


8. Click the hyperlinked title for each training to enter each training's **"Training"** Details screen



## KHBE Application Assister Welcome Packet

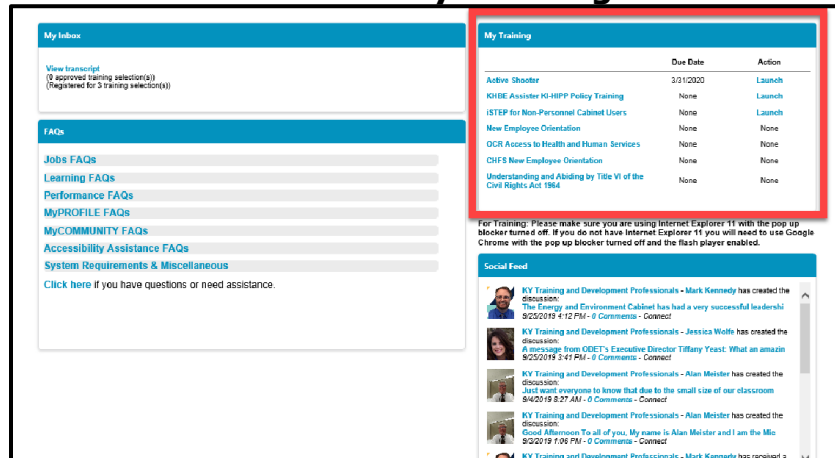
9. Click **"Request"** for each training to register for each training



10. Navigate to the My Purpose homepage



11. Scroll down and locate the **"My Training"** box





## KHBE Application Assister Welcome Packet

12. Click on the **"My Training"** hyperlink at the top of the **"My Training"** box to go to the **"Transcript"** screen

	Due Date	Action
KHBE New Application Assister Training V1	3/2/2020	<a href="#">Open Curriculum</a>
Learning Your Way @ Commonwealth U 4.0	6/6/2020	<a href="#">Launch</a>
NAT Remediation Training	None	<a href="#">Open Curriculum</a>
New Employee Orientation	None	None
OCR Access to Health and Human Services	None	None
CHFS New Employee Orientation	None	None
Understanding and Abiding by Title VI of the Civil Rights Act 1964	None	None

For Training: Please make sure you are using Internet Explorer 11 with the pop up blocker turned off. If you do not have Internet Explorer 11 you will need to use Google Chrome with the pop up blocker turned off and the flash player enabled.

**Social Feed**

Accessibility Focus Group - Elizabeth Cram has received a reply to the discussion: I loved seeing this good news regarding accessibility in Kentucky. Tha  
3/26/2020 8:56 AM - 7 Comments - Connect

Accessibility Focus Group - Neil Poppolewell has received a reply to the discussion: Future Accessibility Guidelines—for People Who Can't Wait to Read Them  
3/5/2020 5:17 PM - 1 Comments - Connect

13. Click **"Open Curriculum"** next to each KHBE Training

Justin Mullins Bio Feedback Transcript Actions Snapshot

Transcript: Justin Mullins

Use the transcript to manage all active training. \*\*\*Please make sure you are using Internet Explorer 11 with the pop up blocker turned off. If you do not have Internet Explorer 11 you will need to use Google Chrome with the pop up blocker turned off and the flash player enabled.\*\*\*

0 HRS  
AGGREGATE TRAINING COMPLETED

FISCAL YEAR ENDING 12/31/2020 COST \$0.00

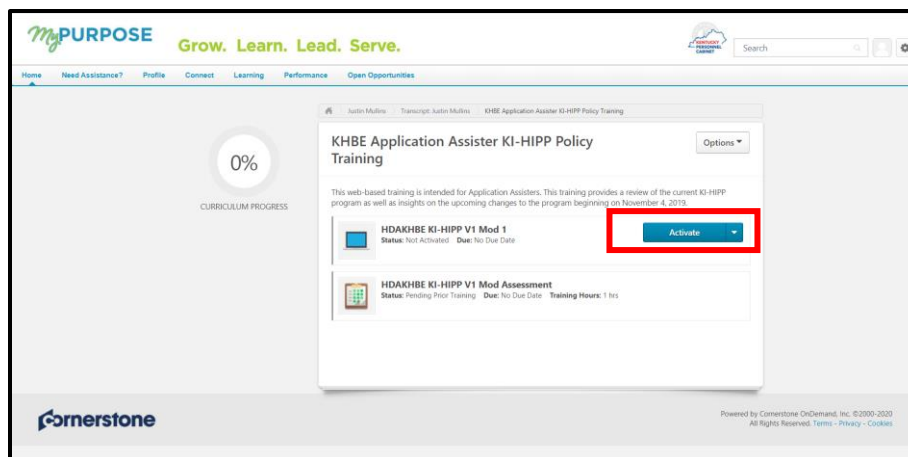
Active By Date Added All Types Search for training

Search Results (2)

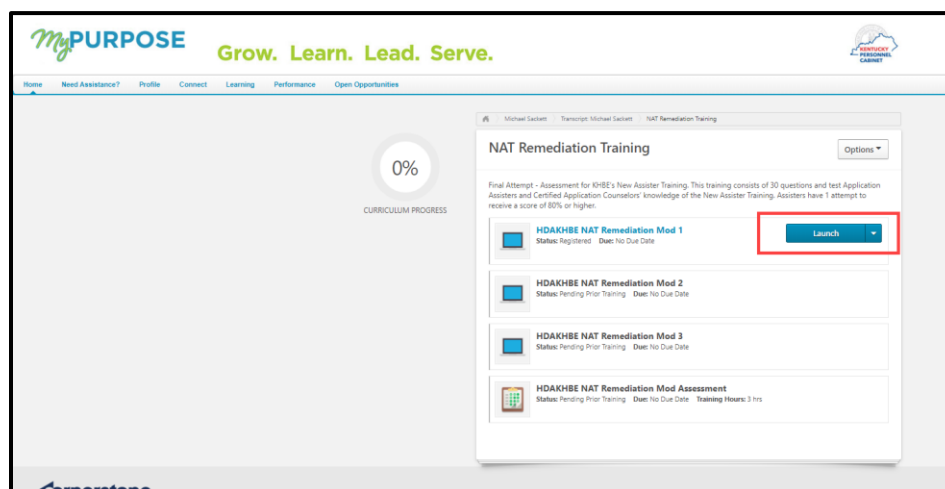
	<b>KHBE Application Assister KI-HIPP Policy Training</b> Due: No Due Date Status: Registered	<a href="#">Open Curriculum</a>
	<b>KHBE Privacy and Security Training</b> Due: No Due Date Status: Registered	<a href="#">Open Curriculum</a>

14. Click **"Activate"** from the training details screen and the **"Activate"** button will switch to **"Launch"**

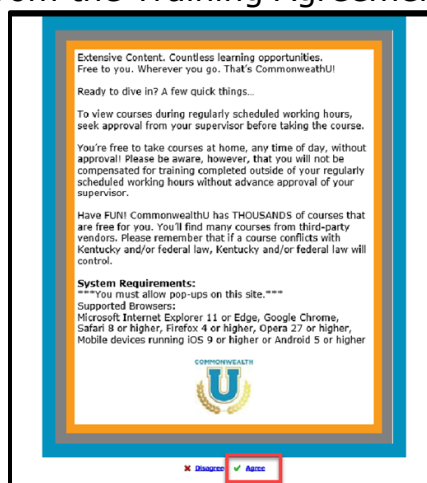
## KHBE Application Assister Welcome Packet



15. Click **"Launch"** next to launch the training



16. Click **"Agree"** from the Training Agreement page



17. Click the training play button once the training pop-up appears to start the training

## KHBE Application Assister Welcome Packet



18. Complete the all required KHBE's State Trainings. **Remember:** Application Assisters should complete KHBE's State Trainings in the following order

- 1 •KHBE FFM Validation
- 2 •KHBE New Application Assister Training V2
- 3 •KHBE Benefind SSP Policy and System Training
- 4 •KHBE Privacy and Security Training
- 5 •KHBE KI-HIPP Policy Training

A full list of KHBE's Trainings can be found in the Application Assister Training Curriculum at the end of this Welcome Packet. For more information on accessing KHBE's Trainings see the Application Assister LMS Quick Reference Guide on KHBE's website: [KHBE.ky.gov](https://KHBE.ky.gov).

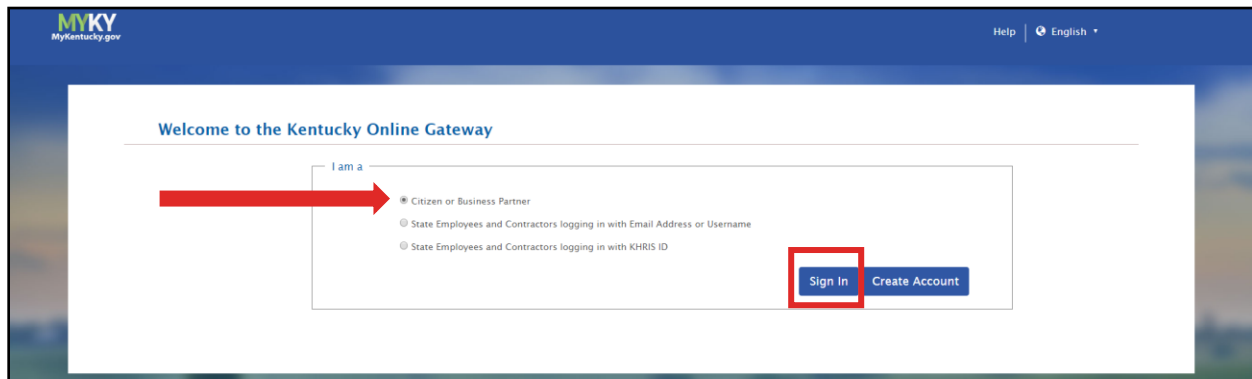
## KHBE Application Assister Welcome Packet

### Inviting the Application Assister to the Assister Role

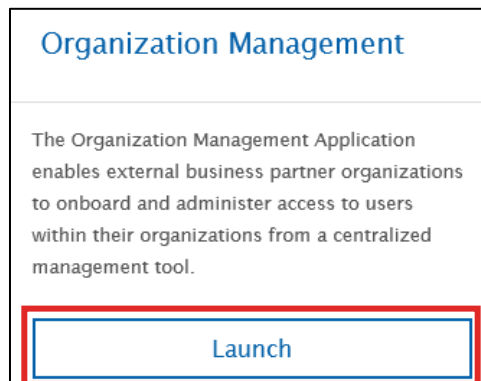
Once the Application Assister has completed the FFM Training and the KHBE Trainings, the Organization Administrator should then invite the Application Assister to the Assister Role in the Kentucky Online Gateway (KOG). This process is similar to inviting Application Assistants to the Assister Training Role and will send an approval email to KHBE. See the steps below for how Organization Administrators should invite Application Assistants to the Assister role.

#### Steps for Organization Administrators to invite Application Assistants to the Assister Role

1. Navigate to the KOG home page using Google Chrome
  - <https://KOG.chfs.ky.gov/home>
2. Select **"Citizen or Business Partner"**



3. Select **"Sign In"** located at the bottom of the screen
4. Sign into your KOG account using your user name and password
5. Click **"Launch"** on the Organization Management Tile from the KOG Dashboard



6. Click **"Manage"** next to the organization you need to manage

## KHBE Application Assister Welcome Packet

The screenshot shows the 'Kentucky Online Gateway' header with a user login 'Welcome Justin Mullins' and links for 'My Account', 'Sign Out', and 'Help'. Below the header is a search area with a text input for 'Org Name', a dropdown menu, and a 'Search' button. A table below the search area displays results:

Organization Name	Organization Type Name	
Accent Therapeutic Services	OKHBE Assistors	Manage

7. Select the **"Invite Users"** tab and search for the Application Assister's name in the **"User to Invite"** search field
8. Click **"Add"** next to Assister Role and Self Service Portal
9. Click **"Send Pending Invitations"**

The screenshot shows the 'Kentucky Online Gateway' header. The breadcrumb trail is 'Organizations > Community Action Kentucky > Organization Invites'. The 'Invite Users' tab is selected and highlighted with a red box. Below the tabs is a search field labeled '1. User to Invite' with a 'Search' button, also highlighted with a red box. Below the search field is a form to 'Please fill out the form below to invite a New User' with fields for 'First Name', 'Last Name', and 'Email Address', and a 'Reset' button. Below this is a section '2. Select Roles To Invite' with a checkbox for 'OKHBE Assister Organization Group'. Below that is a table 'Organization Roles' with columns 'Role Name' and 'App Name'. The table has three rows: 'Assister' with 'Self Service Portal', 'Assister Training' with 'Cornerstone OnDemand', and 'CHFS SP External Visitors' with 'CHFS External SharePoint Sites'. Each row has an 'Add' button, with the 'Add' button for 'Self Service Portal' highlighted with a red box. Below the table is a section '3. Selected Roles' and a green button labeled 'Send Pending Invitations' highlighted with a red box.

Role Name	App Name	
Assister	Self Service Portal	Add
Assister Training	Cornerstone OnDemand	Add
CHFS SP External Visitors	CHFS External SharePoint Sites	Add

An approval email is sent to KHBE to approve the Assister Role.

## KHBE Application Assister Welcome Packet

### Confirming Completing of KHBE Training

5. Confirm completion of trainings and approve Assister Role

Once the Organization Administrator sends the Assister Role invitation an approval email is sent to KHBE to approve the Assister Role. KHBE verifies that the Application Assister has completed their KHBE trainings and that they have sent their FFM Training Completion Certificate, in the proper format, to KHBE. Once KHBE has verified training completion, they will approve the Application Assister for the Assister role resulting in access to Benefind Self-Service Portal and the Benefind SSP tile appearing on the Application Assister's KOG dashboard. See the SSP tile below.

#### Self Service Portal

Allows Kentucky's families to easily access public assistance benefits(SNAP, TANF, MEDICAID, CHILD CARE) and information 24/7 through an online application and account.

Launch

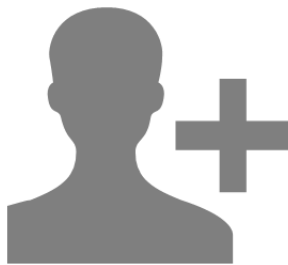
**Finish:** The Application Assister / CAC has now completed onboarding

## KHBE Application Assister Welcome Packet

### KHBE's Application Assister Training Curriculum

Application Assisters and Certified Application Counselors (CACs) are required by KHBE to complete trainings to become an Application Assister or CAC. Additionally, KHBE requires annual trainings to maintain the Application Assister or CAC status. Below is the KHBE Application Assister and CAC curriculum. It is broken into initial trainings for new Application Assisters and CACs, and Annual trainings.

#### Initial Trainings



Trainings required by KHBE to become an Application Assister or CAC:

FFM	New Application Assister	Benefind System
KI-HIPP	Privacy and Security	Agency Administrator (Admins Only)

#### Annual Trainings



Trainings annually required by KHBE to maintain the Application Assister or CAC role:

FFM	Privacy and Security	Org. Administrator (Admins Only)
	Open Enrollment	

The KHBE program may require Application Assisters to complete additional training to continue to improve the Application Assister Program. For further questions please contact the KHBE Program email inbox at [KHBE.Program@ky.gov](mailto:KHBE.Program@ky.gov).